

Advanced Airtable Techniques: Sorting, Grouping, and Filtering a Research Log

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Research logs can become long and unwieldy. Besides using ctrl+F to find something on the page, how else can you find what you need as you write a research report?

Sorting, grouping, and filtering can be used together to find the record you need in the moment quickly. As you create an outline for your report, case study, or another form of genealogical writing, it will help you be more efficient in quickly calling up the records that show evidence for the paragraph you're doing.

Introduction to Airtable – A Web-Based Database Tool

Airtable is a relational database tool that reduces duplicate data entry and tracks multiple data points related to each other.¹ Data points are represented in tables. The rows in the tables can be linked to fields in other tables that describe the data point differently. Keeping information in separate tables is called normalizing our data – "dividing the information into tables with the goal of having a place for everything, and everything in its place."²

Airtable (airtable.com) is a web-based spreadsheet and database program that works well as a research log because it allows you to create links between tables, view your data flexibly, sort and group data, and create unique field types. In Airtable, a

¹ "What is a Relational Database?" Oracle (oracle.com/database/what-is-a-relational-database/ : accessed 30 May 2020).

² "Relational Database Concepts for Beginners," Wofford College webs.wofford.edu/whisnantdm/courses/cs101/pdf/database/Relational_database_concepts.pdf : accessed 1 June 2020).

spreadsheet is called a base, and pages/sheets within the base are called tables. Within each table, rows are called records, and columns are called fields.

Categories for the Airtable Research Log³ from the RLP with DNA 2023 Template

- **Short Description**
 - The first field in the Airtable base is a formula field that automatically fills in with the person, record type, and year once the information in those fields is entered.
- **Person**
 - List the person or persons named in the record.
 - This is a linked multiple-select field, so multiple people in the record can be listed.
 - Group by this field to see the records for each person. If multiple people are named in a record, they will appear together in a separate group. In this case, it is better to filter by the specific person to show only their records.
- **Role**
 - This linked field will populate once the person's role has been noted in the People table of the template.
 - Various roles could be ancestor, research subject, FAN, etc.
 - If using DNA in the project, roles could be DNA test-taker or DNA match.
- **Date**
 - List the date the search was performed.
 - Some databases are updated periodically and need to be rechecked later.
- **Record type**
 - List the specific record type such as census, tax, birth, deed, etc.
 - Sort or group by this field to organize the research log by record type. This is a single select field that has colored options to its easy to see at a glance the various record types.
- **Website/Repository**

³ These categories correspond to the template on Airtable Universe titled RLP with DNA 2023 – either the blank version or the version prefilled with examples.

airtable.com/universe/creator/usrsBSDhwHyLNnP4O/nicole-dyer

- Record the website, library, archive, or other physical location that holds the source.
- The repository could be your files if it is an inherited letter or document.
- **URL/Call#/Microfilm#**
 - In this column, copy and paste the URL from the website.
 - Record the unique call or microfilm number if researching at a library or archive.
- **Locality**
 - List the locality of the record. This is a single select field and can be colored. For example, all the New York localities could be yellow with Massachusetts white.
 - Tip: use a consistent format such as Pulaski County, Arkansas, or Pulaski Co., AR.
- **Year**
 - List only the year for the record event. Once filled in, this will be added to the short description.
 - Add the complete date for the record in the results column.
- **Source Citation**
 - Create a source citation the first time the source is viewed. Use five questions to add all of the details about the source.
 - If the search is negative, there won't be any specifics of an event to list, so name the database, where it is located, and the date it was checked.
- **Results**
 - If nothing was found, use NIL which is short for "not in location. "Add comments about why it might not have been there.
 - If a record was located, detail all of the information. Copy names exactly as they appear in the record.
- **FANs**
 - This is a linked field. List any Friends, Associates, or Neighbors also listed in the record.
 - The FANs listed will automatically appear in the FANs table, where a role can be assigned, or more information can be added about them.
- **Comments and Next Steps**

- Note any ideas for further research or specific information about the search.
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- **Downloaded**
 - This is a checkbox field. Click in the box to show that the document has been downloaded to the computer.
- **Attachments**
 - Add any document images to this field for quickly viewing the document again.

Sorting, Grouping, and Filtering Techniques

Find the sort, group, or filter options at the top of the Airtable base between the fields and the list of tables.

Sort

Sorting is familiar to most genealogists who use spreadsheets. With Airtable, you can sort by multiple fields to help you put records in chronological order and so forth. The sorting function enables you to view records in a table in alphabetical or numerical order.

- Click sort, then select the field to organize the entire table by any of the fields. Choose the option to sort A to Z or Z to A, First to Last, or Last to First.
- Sort by year, so the table sorts chronologically.
- Sort by record type to view all the records of one type together.
- The records (rows) can be sorted by multiple fields by clicking "add another sort."
- Click "automatically sort records" to keep the table sorted as new information is added, or toggle that option off until analyzing the data.

Group

Grouping is a unique feature of Airtable. Group your row into mini-research logs by locality, by person, or by any field you desire. Now you can quickly see all the research done in one particular county that you're focusing on in your report.

- The log can be grouped by any field, then subgrouped within that field.

- For example, group by locality and then record type to have all the records in the locality grouped together.
- You can first group and then sort the groups, for example, group by locality, then sort by date.

Filter

Filtering is a way of searching through records in your Airtable base. Genealogists are familiar with searching a database. This is similar. If you have 200 rows/records of DNA matches, but you only want to see those with a certain most recent common ancestor, filter your view to just that ancestor's name. Now you are looking at 20 rows. You may filter even further just to see matches who share over 20 cM. You have narrowed your list down to 8 rows.

The filtering function helps you find specific records. If you want to see all the tax records you've added to your research log or those found in Hawkins County, Tennessee, you can filter by the record type column or locality column. It's possible to add several filters if you want to view all the census records you've added for a particular person. First, add a filter to show only records with Robert Dyer in the person field. Then, add a filter to show only records with census in the record type field. Now you have all the census records of Robert Dyer in your research log.

- Filtering the research log allows you to filter out extraneous information for the analysis. The information is not deleted, just hidden.
- To filter the research log, add a condition which is a rule that you set for you to see that view of the research log.
- For example, filter by Person to see only the records for a specific person. Add another filter for the locality to see only records for that person in a specific locality.
- You can create a new view for the research log table that you can then filter, and group, and that view will be saved for later use.

Additional Resources

"Advanced Filtering Using Conditions." *Airtable Support*.

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